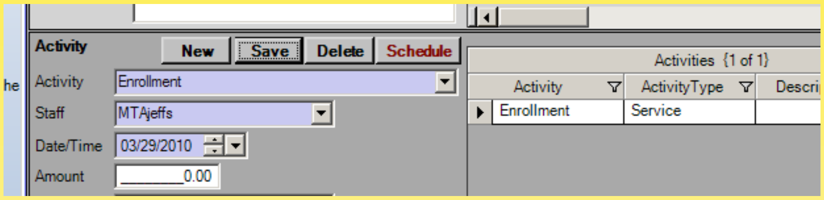
The Dataset

July 16, 2010

an HMIS user-community newsletter for HPRP Providers

Enrollment Service Now Required; Do Not Delete

You've all probably noticed that after enrolling a client in HPRP, a service called 'Enrollment' automatically appears for the client on the Services Provided page. We set that up to occur automatically because having a service is what includes client names on many different reports. Since not all programs mandate the recording of services, this auto-created service plays an important role. However, in response to a recent HUD announcement, this Enrollment service now plays a vital role in accurate reporting.

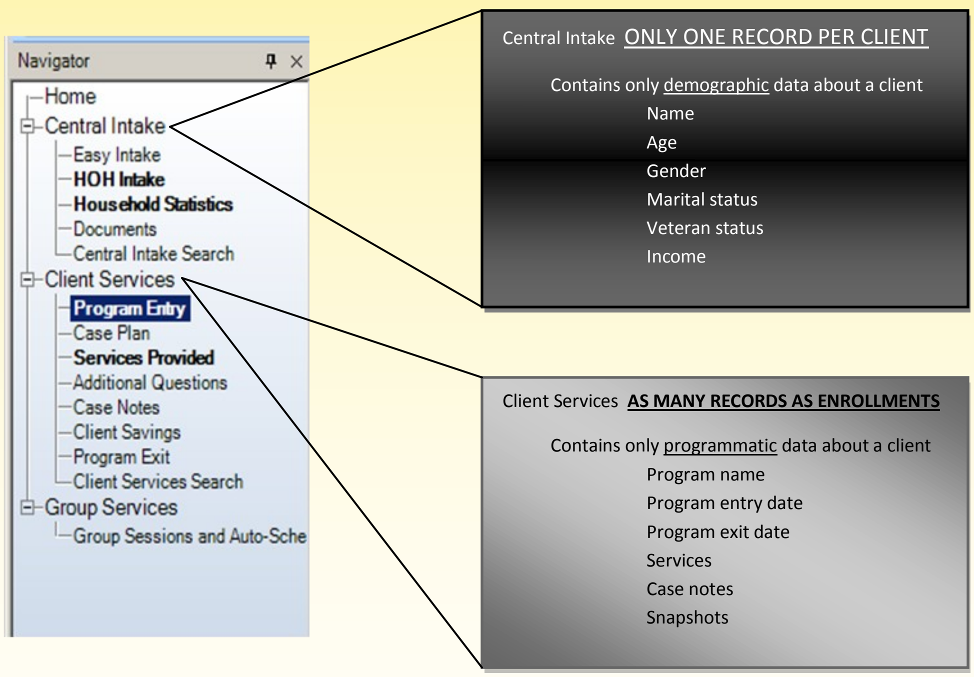


Please leave the Enrollment service transaction intact; do not overwrite or delete this service. EXCEPTION: If you <u>DO NOT</u> pay for case management with HPRP funds, you <u>should</u> delete the Enrollment service.

On some reports, including the Quarterly Performance Report (QPR), the Enrollment service appears as case management, and represents the initial assessment you conducted with your client. HUD wants that assessment recorded on the QPR, so preserving that service transaction is now necessary.

Multiple Central Intake Records Give Commerce Staff Double Vision

Central Intake Records vs. Client Services Records



Commerce staff have been seeing a recent increase in the incidences of duplicate client records in the Central Intake section of the HMIS. Central Intake is the location where you enter a client's demographic data such as name, birth date, SSN, gender, veteran status, and other data on the HoH Intake page and the Household Statistics page.

It is important to think of Central Intake records as 'real-time' or 'live' data on a client. In other words, information in Central Intake should be updated as circumstances change in a client's life. Changes in income, marital status, educational level or other changes should be noted in Central Intake by simply clicking into the appropriate field and overwriting the existing value in that field. For clients who are enrolled in a program should then have a manual 'snapshot' taken to record the changes to Central Intake.

<u>There should never be more than one Central Intake record per client</u>. The intent is that the Central Intake record for a client be used to create as many program records as necessary. Every time a client is enrolled in a program, a program record is created. You can view these program records on the Client Services Search page where you can see the program name, entry date, client name, ID, and many other fields. You should enroll a client in each program in the HMIS in which they participate.

When to Exit Clients From the Program

Now that HPRP is well underway, service providers have begun to encounter the need to exit their clients from the program. This has raised the question of *when* to exit a client. The answer is unfortunately not very concrete; several issues need to be considered. The following are some common scenarios that occur which detail when to exit.

- If you have not provided a service to a client for several weeks, *and you do not anticipate the client will be back for more assistance shortly*, then it would be appropriate to exit the client at this time. This would also be true if your agency has a time limit on services provided. **It is permissible to re-enroll the client in the program again.**
- If you provide a month's rent assistance to a client at the beginning of the month, that client is considered to be receiving the service for the *entire* month. If you determine that the client will not be receiving further rent assistance for any reason, it would be appropriate to exit the client from the program *at the end* of the month for which assistance was given.
- If you have **not** provided assistance to a client for several months, or have not heard from your client for a prolonged period of time, please exit the client, assigning an exit date that is the same as the last day the client received assistance from you.
- Generally, if the client is absent for less than a month, it is okay to leave the record open (client is still enrolled), but monitor closely the client's participation. If the client begins participating again, you can leave the record open. If not, close it with an exit date that is the same as the last day the client received assistance from you.

3 Month Reassessments: What You Are Required To Do

HUD guidelines require you to reassess a client every three months of program participation. Specifically, you have to update the client's *income* in Central Intake, and then click on 'Jump to Program Entry', and then 'Edit Snapshot', and finally 'Snapshot'. This takes a manual snapshot (compared to the automatic snapshots taken and program entry and exit) of any changes you've made in Central Intake. **This should be done even if there are no changes to make in Central Intake!** By seeing the snapshot, we know that you have taken the time to go through the process. Failure to take the snapshot could result in denied payment.

As always, if you have questions about snapshots, Central Intake, or any other HMIS-related questions, please call the Commerce Technical Assistance Team.

Maximize your HMIS potential! Use HMIS to run reports for all of your program, such as THOR, ESHP, WFF, and others. Ask us how!

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